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# PURCHASING USER MANUAL

## ADDING SEPARATE FREIGHT OR SHIPPING CHARGES

### INTRODUCTION

In some cases, you may need to add a separate line item for freight or shipping charges to a requisition if required by your agency's process or for certain vendors or types of purchases. Freight line items can be added at any point up until the fiscal coding is marked as Coding Complete.

### TO ADD A FREIGHT OR SHIPPING LINE ITEM TO A REQUISITION

1. Click **Add Item** to enter the line item(s) for the goods you are requesting.

Figure 1 - Adding a line item

The screenshot displays the 'Requisition' tab of the purchasing system. At the top, there are tabs for 'Status', 'Requisition', 'Approval', and 'Reports'. Below these, there are fields for 'Department' (BHS: BUREAU OF HOMELAND ST), 'Req #' (159), and 'Tracking #' (159). There are also buttons for 'New Requisition', 'Save', and 'Print Preview'. The 'Save' button is circled in red. Below these fields, there are sections for 'Need by' (01/14/2008), 'All or Nothing' (checkbox), 'Req Notes', and 'Req Atch'. There is a 'Description' field with 'Packs' entered. Below this, there is a 'Status' section showing 'New Requisition' and 'Requested by: JAMES CARTER (01/08/2008)'. There is also an 'Edited by: JAMES CARTER (01/08/2008)' field. At the bottom, there is a table with columns: 'Notes', 'Atch', 'Status', 'Item #', 'Description', 'Qty', 'UM', 'Price', 'Sub Total', and 'Workflow'. The table has one row with 'Packs' in the 'Description' column, '0' in the 'Qty' column, and '0.00' in the 'Price' column. The 'Add Item' button is circled in red. There is also a 'Clear All Items' button.

Notes	Atch	Status	Item #	Description	Qty	UM	Price	Sub Total	Workflow
				Packs	0	~Select UM~	0.00	0.00	~Select Workflow~

2. Click **Save**.
3. Click **Menu** next to the line item that you want to add freight charges to.

Figure 2 - Line Item Menu

The screenshot shows a software interface for managing line items. At the top, there are buttons for 'Add Item' and 'Itemize Complete', and a status 'Changes Saved'. Below this is a summary row: 'Total: \$400.00' and checkboxes for 'Vendor Info', 'Coding Info', and 'Receiving Info'. The main table has columns: Notes, Atch, Status, Item #, Description, Qty, U/M, Price, SubTotal, and Workflow. Two items are listed: Item # A1, Description 'Packs', Qty 4, U/M 'Each', Price 60.00, SubTotal 240.00, and Workflow 'wf1'; and Item # A2, Description 'Packs', Qty 2, U/M 'Each', Price 80.00, SubTotal 160.00, and Workflow 'wf1'. A context menu is open over the first item, listing options: Delete Line Item, Duplicate Line Item, Create Freight Item, Show History, Show Full Description, Request Price Check, Edit Ship-To Address, and Edit Bill-To Address.

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
			A1	Packs	4	Each	60.00	240.00	wf1
			A2	Packs	2	Each	80.00	160.00	wf1

4. Click **Create Freight Item** to create another row to enter freight charges separately.
5. Enter the **Price** for the amount of the charges and select a **Workflow**.

Figure 3 - Freight Charge line item

The screenshot shows the same software interface as Figure 2, but now with three items. The third item is a freight charge: Item # 'Freight A2', Description 'Packs', Qty 1, U/M 'Freight Charge', Price 8.00, SubTotal 8, and Workflow 'Worker'. The 'Clear All Items' button is now visible at the top right. The status 'Changes Saved' is still present. The summary row shows 'Total: \$400.00' and checkboxes for 'Vendor Info', 'Coding Info', and 'Rcpt Info'. A note '\*Press F3 for Lookup' is also present.

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
			A1	Packs	4	Each	60.00	240.00	Worker
			A2	Packs	2	Each	80.00	160.00	Worker
			Freight A2	Packs	1	Freight Charge	8.00	8	Worker

6. When finished with adding requisition line items and freight charge line items, click **Itemize Complete**.
7. Depending on your agency's process, the requisition will be ready for either authorization or fiscal coding.
8. A freight charge line item can be coded differently than the requisition line item if needed. A freight charge item can also be approved or rejected separately from the line item.